OHSU

Care Management (CMP) Discussion Guide

Ver4.0

CMP Team
11/18/2008

Life of a case under Care Management

Outline

1. **Introduction (15 minutes)**
2. **Day in the life (30 minutes)**
3. **Process mapping (30 minutes)**
4. **Benefit analysis (20 minutes)**

Introduction:

Hello my name is _____ and this is _____ from the ICCIS project at OHSU. We would like to better understand the needs of people in primary care clinics. We are here to speak with people like yourself to understand a little bit about your daily tasks and work processes. We are also interested in understanding your attitudes about issues related to care management. We will use what we learn with you today to develop products that better suit your needs and better fit your work processes.

We have a few exercises to do today some questions, and most importantly, discussion. I'll ask some questions about not only care management but also a wide range of other things related to your work, how you do certain tasks, etc.. If you prefer not to discuss some area, it's no problem – just let us know. Please be as open as possible. There are no right or wrong answers (please stress this). We are interested in any thoughts and perspectives you have. We will be audio taping our conversation as a way of taking notes for ourselves, so please speak up so that we can capture your thoughts. The audio will be held confidential and will not be reproduced.

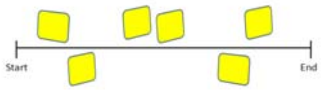
Do you have any questions? If not let's get started!

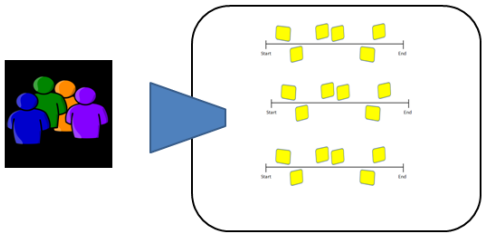
Background:

First, we are going to ask you a few questions about how the clinic operates, your role, and the kinds of tasks you perform.
(Notes: The purpose of this exercise is to get them thinking about tasks we define as care management without biasing their response. For novice clinics, this will require more time; for experts, less)

Question	Novice	Expert
Describe your general role in the clinic	**Nurse, etc.**	**'Care Manager'**
Using your own definition, what kind of care management activities do you do in clinic?	**Unsure or limited**	**Population management, quality management, follow-up, motivational interviewing, education**
For Physician: How do you DECIDE to involve the nurse in the care of the patient? For Nurse: What KIND of patient generally gets REFERRED to you? How will/do you go about DECIDING what you will do for any particular patient?	**Triage, Reactive**	**Proactive assessment, quality metrics, lists**

Care management task





Now we would like to learn about a person who might receive care management. We would like you to describe for us what types of things/activities you for a typical so we can understand some of the "context" of your work. While you're telling us what you're doing during a case, we'll be documenting it with Post-Its and paper so we can construct a timeline of your day. Our timeline has a line with start on one end and end in the other.
(Note: refer back to a prototypical example they gave in the previous questions; these may be : patient in crisis I refer to the nurse for counseling; a new diabetic who needs education; a quality protocol where I refer a patient to a nurse for medication adjustment; a list of patients I get from the registry that I ask Him to call; Create plans of care over time …)

1) **How would you describe your typical care management experience?** *(Let them start with their top of mind activities!) Encourage them to get the big blocks of time down then probe for in between activities)*

(If in need of a prompt:)
- What do you do for a typical referral? Do you meet with the patient? If, yes… what do you do?
- When do you start the care? How do you communicate? How do you follow-up?

(After establishing what the big activities of the experience are, probe each in greater detail)

Activity#1: – What do you do here …? Describe it in more detail.
Activity#2: – What do you do here …? Describe it in more detail.
Activity#3: – What do you do here …? Describe it in more detail.
Activity#4: – What do you do here …? Describe it in more detail.

2) Now that we know more about your typical case, we would like to discuss what tools you use to help with these kinds of cases

What tools do you use to manage information in the clinic when you are completing these processes?

- (Computer, Electronic Health Record, Population Registry, Care Management Information System (like CMT), Other IT)

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3) Now that we have a better understanding of your day, **we'd like to know which parts of this timeline you find interesting or easy and which parts are challenging.**

- Why do/don't you like those parts of the process?

- What is your best time of the process? Why?

- What is your most challenging part of process? Why?

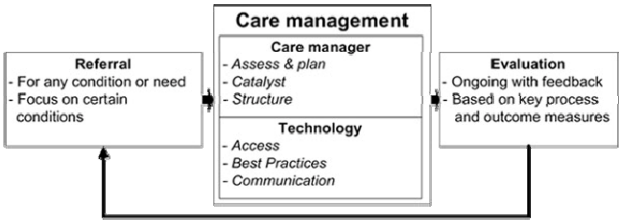
- Can you tell us about a favorite experience that you've had recently - what made it different?

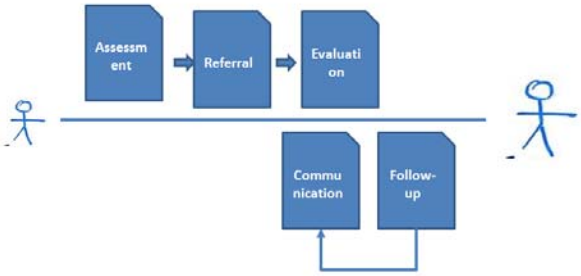
Process Map

Now we would like to talk more specifically about your care management process. Here again we have a worksheet with which to create a timeline (bring out worksheet).

- Who are all the people who use the process? (List)
- What times of day does the process get used? Who uses it and What do they use it for most frequently? (make notations on the worksheet to document the uses and times)

After listing all uses, ask about the individual uses





Key: P-Physician, N-Nurse/Care Manager

1. Patient Identification & Referral - "Let's go back now to when you were first going to refer a patient / realized a patient had ongoing care management needs . ."

	Who makes the decision to care manage / work more closely with a patient?	P	N
Referral	Historically what % of your patients would fit the definition of needing care management?	P	N
	How many encounters would you estimate with them over the care plan?	P	N
	What conditions or needs would you generally focus on?	P	
	How do you enter the person into your system/process?	P	N

	What other alternative options might you consider for a patient?	P	
	Do you apply the learning from previous patients to identifying new patients for care management?	P	

At this point, the physician can leave if there time is tight.

2) Execute Care Management – “Tell me about the care management process.”

	How do you assess the patient?		N
	How do you prioritize items for the patient?		N
Assessment	How do you set goals with patients? How do you follow-up on goals?	P	N
	Do you provide education to the patient? What sort? What medium?		N
	How long is the assessment loop?		N

	Do you often have everything necessary to complete the job?		N
	Do you use any other tools to help you? (notes, spreadsheets, etc)		N
Care & Follow-up	Do you use protocols? If yes give me a few examples.		N
	How do you know a patient has completed the care plan? How do you know if a plan is not being followed?	P	N
	How do you decide if a plan needs to be changed? Who makes this decision?		
	How do you know that they were successful? What are your metrics? How are metrics decided upon?	P	N
	How do you track success?		
	Can you treat a population of patients with a care plan? How do you find a set of patient with a certain condition.	P	N

	Can the patient self manage all or part of the process? How is that enabled? How can a patient influence/change their care management?		N
Communication	Do you have notifications? Such as reminders or updates?	P	N
	Let's talk about metrics. Do you have planed updates? Who do you update? (formal)	P	N
	How about measuring how well you are doing on a set of patients or how a care manager is doing? (informal)	P	N
	When you go on vacation who covers for you? How?		N
	Who accesses the care plan?		N
Evaluation	How do you know/measure if a patient is satisfied with the care?	P	N
	How often do you terminate a patient from care management? What's the process?	P	N

Optional

Care Management demonstration *(keep focus on system interactions)*

Now we would like to see you and your Care Management activities in action.

Please turn your Care Management program on and walk us through how you do these activities (the top three activities)

What do you like, dislike, about using your Program?		N
Next activity area: (EHR, registry, post-it's, etc)		N
Ask them to do an unfamiliar task (i.e.:enter data into an unfamiliar protocol or find the results of an assessment) – how do they go about it?		N

Post demonstration questions:

What was the one or the two things you were hoping that the system would do for you or your clinic that it didn't do?		N
Now that you have been using it for ____ years, what do you think has been the biggest surprise or unexpected thing about program use?		N
What is the biggest challenge about using your program? What would you most like to change?		N

Benefit Assessment

How do you expect care management will change your clinic?	P	N
What do you think are the major challenges/obstacles in implementing care management in your clinic?	P	N
What things do you think can help better adoption of care management in your clinic?	P	N
Have you considered any or seen them at work?	P	N
What features would this system have to provide to become a must-have?	P	N
Here is a sample care plan? What do you think? ***SHOW CMT SCREEN SHOT HERE***		N
Here is a sample care management report? Useful? Would you add anything? ***SHOW CMT SCREEN SHOT HERE***	P	N
Here is a protocol? What do you think? Would you add or anything to it? ***SHOW CMT SCREEN SHOT HERE***		N